



BOARD FOR PROFESSIONAL ENGINEERS AND LAND SURVEYORS

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www.dca.ca.gov/pels

**ENGAGEMENT RECORD AND REFERENCE INFORMATION**

- A minimum of four references are required.
- A reference for each engagement claimed as qualifying experience is required.
- A reference **must** be a licensed Professional Engineer in the same discipline for which you are applying. Individuals who are applying to take the Electrical or Mechanical Engineer examination may use licensed Civil Engineers as references.

NOTE:

A minimum of four references are required and must be from persons who are technically competent to appraise your skills as an engineer. If you are applying to take the **Electrical** or **Mechanical** Engineer examination and your references meet the exemption criteria (see Section 4, Question 13 of the Plain Language Pamphlet), your references are not required to be licensed.


If you are applying to take any **“Title Act”** Professional Engineer Examination, your references are not required to be licensed.

- A reference should not be related to you. If you are in a situation, such as a family business, which necessitates the use of a relative to verify your qualifying experience, you must in addition to the reference supplied by your relative, have a licensed engineer such as an officer of the company, a client or other qualified person submit an Engagement Record and Reference Form to verify your employment during that time period.
- References are considered in the following descending order of significance:
 - 1) immediate supervisor.
 - 2) indirect supervisor.
 - 3) co-worker at equal or higher level, and
 - 4) other qualified person.
- Please refer to the Plain Language Pamphlet for additional information regarding references.

INSTRUCTIONS FOR COMPLETING THIS FORM:

You cannot electronically save any of the additions you make to this form. In other words, after you complete this form on your computer, it can not be saved with your information. We recommend that before typing your responses online, you print two blank copies and complete one by hand. When you're sure all the answers are complete, open the application file again and enter your responses on the form, then immediately print, and sign and date it. Make a copy for your files before mailing your application materials.

To Fill Out the Form:

- Use month/day/year format for dates (02/06/74).
- Use standard abbreviations where possible (i.e. Sr for Senior, Mgr. for manager, St for Street, CA for California, etc.) **If all of the characters you have typed do not show up on the form, the missing characters will not print. Go back and shorten or abbreviate your answer to fit.** Font size cannot be changed in Acrobat Reader.
- Use the magnifying glass to increase (click once) or decrease (control+click) your view of the form
- Select the "hand" tool. Move the hand over the first blank on the form. The hand will turn into an "I-beam" cursor.
- Type the requested information. Press Tab to accept the change and to go to the next field.
- For check boxes, the hand will become an arrow. Click cursor to mark box.
- Press shift+tab to go to the previous field.
- Pressing Tab, Return, or Enter will accept the entry you've made and enter it on the form. **If you do not press tab, return, or enter, the information you entered will not be accepted and will not print out.**
- Once you have completed the form, print it, sign it, and make a photocopy for your files.
- Send BOTH Part A and Part B of the Engagement Record and Reference Form to your reference. The reference must complete Part B and return both A and B to you in the envelope he or she has signed and sealed. The signature and seal belong on the back of the envelope, over the closing flap.
- When you mail the form, please do not include this page of instructions. 
- You must include a copy of the INFORMATION COLLECTION, ACCESS AND DISCLOSURE sheet for his or her review. The reference should NOT return the sheet to the Board.



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2535 CAPITOL OAKS DRIVE, SUITE 300

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BOARD INTERNET ADDRESS: <http://www.dca.ca.gov/pels>



ENGAGEMENT RECORD AND REFERENCE FORM

This form must be submitted for each engagement claimed as qualifying experience. "SEE ATTACHED" and Resumes are not acceptable in lieu of this form. *This form must be typed, or it will be returned to applicant.*

BRANCH _____

This form is due in the Board Office Postmarked by the Final Filing Date of _____

Failure to have all documents in the Board Office by the final filing date will result in the Applicant not being set to the current examination.

PART A – TO BE COMPLETED BY ALL APPLICANTS

A COPY OF THE INFORMATION COLLECTION, ACCESS AND DISCLOSURE MUST BE INCLUDED

I, the Applicant, hereby demonstrate qualifying experience as required by the Board Rules and the Business and Professions Code. Each engagement being claimed as qualifying experience must be summarized on a separate Engagement Record and Reference Form

1. Last Name		First Name		Middle Name
2. Street Address		City	State	Zip Code Country
3. Month/Day/Year of Birth: / /		4. Phone - Area Code, Number & Ext. Home: Business:		
Engagement Number	DATES (mo/day/year)	TOTAL TIME WORKED (for this engagement) months	Company: Address: Applicant's Title:	
	From:	QUALIFYING EXPERIENCE (**see note below) <div style="text-align: right;">months</div>	Supervisor's Name:	
	To:		Supervisor's Phone:	
			Reference Name: (If not supervisor)	

All of the following items must be completed. Refer to the Plain Language Pamphlet for instructions.

Tasks:

Level of Responsibility:

Engineering Decisions Made:

Projects:

**** Qualifying experience claimed for this Engagement includes only professional level work. It does not overlap with credit claimed for education. It does not include overtime, training, orientation, non-engineering, student summer or non-professional work. Qualifying experience may be less than the total number of months worked. It is computed by Total Months Worked less Non-Qualifying Experience. Qualifying Experience means engineering employment that requires the applicant to use good engineering judgement in making engineering decisions and contributes to growth as a Professional Engineer.**

Signature of
Applicant _____
(Revised 9/01)

Date _____ Year _____

PART B - TO BE COMPLETED BY REFERENCE

(PART B OF THIS FORM DOES **NOT** NEED TO BE TYPED)

You, as the reference, may request additional experience information from the applicant including the Board's licensing requirements as contained in the Plain Language Pamphlet (on the Internet at <http://www.dca.ca.gov/pels>). You must personally complete, sign, seal, and return this form to the applicant in the envelope provided to you by the applicant.

- (1) My relation with the Applicant has been/is: ☐ Employer ☐ Supervisor
☐ Co-Worker* ☐ Reviewed Work* ☐ Associate* ☐ Other*
- (2) Do you consider the Applicant technically qualified to be registered as a Professional Engineer?
☐ Yes ☐ Not yet ready*
- (3) I have personally seen and reviewed the Applicant's plans, calculations and/or reports. ☐ Yes ☐ No*
- (4) I have personal knowledge of his/her work experience from the date of _____ to the date of _____
- (5) ☐ I am a Professional Engineer legally authorized to practice in the branch of _____ Engineering.
Initial Date of License _____ Expiration of Current License _____ (month and year)
- or ☐ I am legally exempt from licensure.
- (6) Are you related to this Applicant by blood, marriage or adoption? ☐ Yes* ☐ No
- (7) Do you verify the applicant's information on the reverse, including position title and employment dates?
☐ Yes ☐ No
- (8) * REMARKS: Explain all responses marked with an asterisk (*) in this section. Also, include any additional information about the Applicant's engineering experience, capabilities or limitations. (Use additional sheets as needed.) **If you and the applicant currently have different employers, please explain how you know of the applicant's experience.**

(9) My appraisal of the applicant's engineering performance is:			PLEASE AFFIX YOUR WET STAMP OR ENGINEERING SEAL IN THE SPACE BELOW
<u>FACTOR</u>	<u>SATISFACTORY</u>	<u>NOT YET READY</u>	
Technical Competency	_____	_____	
Engineering Judgement	_____	_____	
Professional Integrity/Ethics	_____	_____	
Project Communications	_____	_____	
Independent Decision Making	_____	_____	
Coordination of Project Support Staff	_____	_____	
Code/Regulatory Knowledge	_____	_____	
Responsible Charge Capability	_____	_____	

(10) I certify under penalty of perjury that these statements are true and correct to the best of my knowledge and that I have personally examined the applicant's work.

Your Title _____

Your Name _____

Your Company Name* _____

Signature _____

Address _____

Cert No/Expire Date _____

Branch/State _____

Phone () _____

Date _____

PLEASE STAMP OR SEAL FORM WITH YOUR PROFESSIONAL ENGINEER'S STAMP